



Activity Review

North Carolina State Board of Certified
Public Accountant Examiners



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What Is an **ADMINISTRATIVE FORFEITURE**

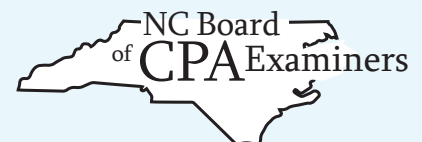
of a North Carolina
CPA Certificate?

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What Is an Administrative Forfeiture of a North Carolina CPA Certificate?

According to [21 NCAC 08J.0101\(a\)](#), all active CPAs must renew their certificates annually by July 1. If a CPA fails to comply with the renewal requirement, the Board will send a demand letter to the CPA at their most recent mailing address, as per section (c) of the rule.

On July 1, 2024, the Board mailed demand letters to about 700 North Carolina CPAs who did not renew or request inactive status by the July 1 deadline.

The demand letter requires the certificate renewal to be completed within 30 days. The CPA also has the option to apply for inactive status, which

must be completed and submitted to the Board office within 30 days.

CPAs need a portal/dashboard account to renew their CPA certificate. The Board's homepage has a link for CPAs to create a user account for completing the annual renewal. Applications to request CPA-retired or inactive status are on the [Forms & Applications page](#) of the Board's [website](#).

Administrative forfeiture of a North Carolina CPA certificate occurs when a CPA fails to renew or request a status change to inactive within the specified time frame. Consequently, the individual cannot use the CPA title in NC

and must return their certificate to the Board office within 15 days of receiving the notice of forfeiture.

Although an administrative forfeiture is not a disciplinary action, using the CPA title while on forfeited status may result in disciplinary action by the Board. An individual whose certificate has been forfeited for failure to renew may apply for reissuance after meeting the [21 NCAC 08J .0106](#) requirements.

To avoid an administrative forfeiture, renew your certificate or request inactive status before August 1, 2024. If you have questions, please contact [Buck Winslow](#), the Board's Licensing Manager.

NCACPA Names New CEO

Effective July 1, 2024, Mark Soticheck II, CPA, CGMA, is the new CEO of the North Carolina Association of CPAs (NCACPA). He joined the NCACPA in May 2016 as chief operating officer and served as interim CEO for several months following Sharon Bryon's retirement earlier this year.

Mr. Soticheck, who earned his North Carolina CPA certificate in 2004, first became involved with the NCACPA as a member of various committees. He later served on the NCACPA Board of Directors as a member and Treasurer

"We are thrilled to announce Mark as the new CEO of NCACPA," said Dr. Courtney Knoll, CPA, Chair of the NCACPA Board of Directors. "Mark's extensive experience within the organization and his forward-thinking approach are invaluable assets that will undoubtedly strengthen our association."

"As the accounting profession continues to face significant changes, Mark's rich knowledge of our organization and his proactive approach make him exceptionally suited to lead NCACPA, and I am confident that his visionary leadership is exactly what we need to thrive in these dynamic times."

Mr. Soticheck has more than twenty years of experience in the accounting profession. He is a current NC State University Poole College of Management Accounting Department Advisory Board member and a past member of the AICPA Council.

David R. Nance, CPA, Executive Director of the State Board of CPA Examiners, said, "On behalf of the Board, congratulations to Mark on his new role with the NCACPA. We look forward to continuing to work with the NCACPA in a collaborative manner that benefits the profession and protects the public."

Mark Soticheck, CPA



CPE Audit Orders

The following matters are excerpted from Consent Orders issued by the Board in response to Continuing Professional Education (CPE) audit findings. Pursuant to NCGS 93-12(9), "any disciplinary action taken [by the Board] shall be in accordance with the provisions of Chapter 150B of the General Statutes. The clear proceeds of any civil penalty assessed under this section shall be remitted to the Civil Penalty and Forfeiture Fund in accordance with G.S. 115C-457.2." NCGS 115C-457.1(b) states, "The Fund shall be administered by the Office of State Budget and Management. The Fund and all interest accruing to the Fund shall be faithfully used exclusively for maintaining free public schools."

JASON BEHRENS, #40805 | LEBANON, NJ

The Board opened a case against Jason Behrens ("Respondent") for failure to complete the CPE required to renew their North Carolina CPA license.

As part of the CPE audit, the Board staff asked Respondent to provide certificates of completion for the 2021 and 2022 CPE years. The Board, in its review of the documents submitted by Respondent, determined that Respondent could not substantiate all of the CPE claimed for 2021.

Respondent's action is a violation of 21 NCAC 08N .0202(a), .0202(b)(3), and .0202(b)(4). Respondent's CPA certificate is

subject to a one-year stayed suspension starting the day the Respondent was granted inactive status.

If the Board finds that Respondent has violated any other Board Rules of Professional Conduct during the one-year period, the stay will be lifted, and Respondent's CPA certificate will be actively suspended.

Respondent may apply for active status of their CPA certificate by meeting the requirements of 21 NCAC 08J .0105(c) and paying a \$1,000 civil penalty.

CHRISTOPHER ALAN LAWING, #17039 | CONCORD, NC

The Board opened a case against Christopher Alan Lawing ("Respondent") for failure to complete the CPE required to renew their North Carolina CPA license.

As part of the CPE audit, the Board staff asked Respondent to provide certificates of completion for the 2021 and 2022 CPE years. The Board, in its review of the documents submitted by Respondent, determined that Respondent could not substantiate all of the CPE claimed for 2021 and 2022.

Respondent's action is a violation of 21 NCAC 08N .0202(a), .0202(b)(3), and .0202(b)(4). Respondent's CPA certificate is

subject to a one-year stayed suspension of the certificate starting the day it was placed on forfeit status.

If the Board finds that Respondent has violated any other Board Rules of Professional Conduct during the one-year period, the stay will be lifted, and Respondent's CPA certificate will be actively suspended.

Respondent may apply for reissuance of their CPA certificate by meeting the requirements of 21 NCAC 08J .0106, paying a \$1,000 civil penalty, and providing certificates of completion for CPE completed to make up for the prior deficiency.

REBECCA ROARK BOATWRIGHT, #26063 | BELMONT, NC

The Board opened a case against Rebecca Roark Boatwright ("Respondent") for failure to complete the CPE required to renew their North Carolina CPA license.

As part of the CPE audit, the Board staff asked Respondent to provide certificates of completion for the 2021 and 2022 CPE years. Respondent admitted to the Board they had not timely obtained the CPE required for renewal of their North Carolina CPA certificate.

The Respondent's action is a violation of 21 NCAC 08N .0202(a), .0202(b)(3), and .0202(b)(4).

Respondent's CPA certificate is subject to a one-year stayed suspension.

If the Board finds that Respondent has violated any other Board Rules of Professional Conduct during the one-year period, the stay will be lifted, and Respondent's CPA certificate will be actively suspended.

Respondent must pay a \$1,000 civil monetary penalty and make up the CPE shortfall.

50 YEARS OF NC CPA LICENSURE

Congratulations to the following individuals who have been actively licensed as North Carolina CPAs since July 1974.

Brewer Moody Ezzell
Dale Lee Flesher
Kenneth Bruce Hawkins
Kenneth Barry Morgan
Robert Andrew Neill

Elizabeth Daniel Palmer
Miltom Emmett Petty
Robert Lee Underwood III
Gary Donald Wilson



Board Member Spotlight: Jennifer Van Zant, Esq.

Jennifer Van Zant, Esq., is one of two public members of the Board representing the public's interests. She was first appointed to the Board in 2019 and reappointed in 2022.

Ms. Van Zant is a member of the Audit Committee, the Professional Standards Committee, and the Strategy Committee. She has previously served on the Professional Education & Applications Committee.

For several years, Ms. Van Zant has been included in "The Best Lawyers in America," "North Carolina Super Lawyers," and Business North Carolina's "Legal Elite" in multiple categories. North Carolina Lawyers Weekly has recognized her as a "Leader in the Law" and one of its "Women in Justice."

Why did you want to serve on the Board? I enjoy working with CPAs and have a great deal of respect for the profession. Serving on the Board is an excellent way to serve the public and engage with fellow professionals.

What would you like people to know about the Board? The Board is here to help. We all care about the profession, and we want to help CPAs serve the citizens of North Carolina fairly and competently.

What advice do you have for someone new to the CPA profession? Do your CPE early and track it carefully. Call the Board office if you have questions; the staff are incredibly knowledgeable and ready to help.

Where do you work and what's your job title? I am a partner at Brooks Pierce (Brooks, Pierce, McLendon, Humphrey & Leonard, LLP) in Greensboro and have worked there for almost 29 years.

What motivates you at work? Two of my favorite things are winning and helping people. Being an attorney hits both of those areas.

What's something you find challenging about your work? Saying no. Everything is so interesting, and people's problems are pressing, but I must protect my time so I can preserve a balance and keep the energy and focus I need to fulfill my commitments.

What kind of music do you like? My daughter has turned me into a Swiftie! We saw the ERAs tour in Philadelphia in May 2023, and we are headed to NOLA in October.

Do you have any hobbies? I love to run. I have set a goal to run 2024 miles this year and am on track!



CPA CERTIFICATES ISSUED

On June 24, 2024, the Board approved the following individuals for North Carolina CPA licensure:

Jordan Carter Bailey
Abby Renee Baukema
Alyssa Jordan Carey
James Scott Carslaw
Remson Moore Covington
Melissa Sue Endicott
Zachary Michael Fry
Peter Christopher Gallagher III
Phuong Dinh Green
Porter Ian Heath
Gabrielle Marie Juba
Iryna Koshova

Robert William LaBelle
Ethan Alexander Minshew
Justin Blake Quinn
Elizabeth Ann Rohlfs
Steven Michael Sharp
Meghann Victoria Swanson
Stephen Robert Waldman
Kathryn Elizabeth Watson
Ashley Anne Westerberg
Amy Marie Wood
Yang Li Wu

Successful Exam Candidates

The June *Activity Review* contained a list of North Carolina Uniform CPA Exam candidates who passed the Exam between January 1, 2024, and March 31, 2024. However, the names of the following successful Exam candidates were inadvertently omitted from the list:

Kevin Tyler Crooker

Elizabeth Hudson Kane

We apologize for the oversight.

CPA EXAM FEES EFFECTIVE SEPTEMBER 1, 2024

Effective September 1, 2024, the Uniform CPA Exam section fees will increase. Applications postmarked before September 1, 2024, will be processed using the current fee schedule. Applications postmarked on or after September 1, 2024, will be processed using the new fee. When applying for the Exam, make sure you include the correct payment. Please send your questions about the CPA Exam to the Board's Exam Specialist, **Phyllis Elliott**.

	Application Post-marked before September 1, 2024	Application Post-marked on or after September 1, 2024
Administrative Fees		
Initial Exam Application	\$230.00	\$230.00
Re-Exam Application	\$75.00	\$75.00
Section Fees		
AUD	\$254.80	\$262.64
BAR	\$254.80	\$262.64
FAR	\$254.80	\$262.64
ISC	\$254.80	\$262.64
REG	\$254.80	\$262.64
TCP	\$254.80	\$262.64

2024 CPA EXAM TESTING AND SCORE RELEASE DATES

All dates are tentative and subject to change. For official testing & score release dates, check the [AICPA website](#). For score release notifications, please follow [@NASBA on X \(Twitter\)](#).

Exam Section	Testing Dates	If the AICPA Receives Your Exam Data File By*:	Your Target Score Release Date Is:
Core Sections			
AUD, FAR, REG	04/01/2024-06/25/2024	06/25/2024	07/31/2024
	07/01/2024-09/25/2024	09/25/2024	10/31/2024
	10/01/2024-12/26/2024	12/26/2024	01/29/2025
Discipline Sections			
BAR, ISC, TCP	07/01/2024-07/31/2024	07/31/2024	09/10/2024
	10/01/2024-10/31/2024	10/31/2024	12/10/2024

*Exam data files received after this date will be included in the next scheduled score release.

CPA Certificate Reclassifications

Reinstatement

On June 24, 2024, the Board approved the following application for certificate reinstatement:

Michael Cirillo, #44979 Apex, NC

CPA-retired Status

Between June 16 and July 12, 2024, the Board approved the following applications for CPA-retired status:

Cynthia Harpster Alderman, #25950	Southport, NC
Darwin Edward Bowman, #19726	Glendale, AZ
Phyllis Elikai, #18397	Wrightsville Beach, NC
Selwyn A. Feaster, #20548	Greensboro, NC
Gary Brent Jordan, #21486	Asheville, NC
Jurgen Jost, #22729	Hoffman Estates, IL
Charles Gary Lanvermeier, #12248	Jacksonville, NC
William Norman Lewin, #9880	Asheville, NC
Melissa Dawn Ross, #31091	Mooresville, NC
Jeffrey Dean Smith, #15373	Harrisburg, NC
Monty Keith Venable, #10977	Mount Airy, NC
David Allen Youngdahl, #17581	Greensboro, NC

Inactive Status

Between June 17 and July 12, 2024, the Board approved the following applications for inactive status:

Sandra Allen, #15327	Southern Shores, NC
Jason James Ashley, #46840	Chattanooga, TN
Jason Roger Atwell, #46287	Weddington, NC
Matthew Barr, #32350	Roanoke, VA
Robert Mason Barrett Jr., #45310	Richmond, VA
Jordan Matthew Barsanti, #46108	Greenville, SC
Christopher Brian Bass, #38176	Whitesburg, GA
Gary Summitt Beal, #23009	Sanford, NC
Denise Marie Bennen, 37591	Galena, IL
Sonja Marsh Bennett, #12085	Boone, NC
Allen Bizub, #22518	Raleigh, NC
Shawna Lynette Blomkvist, #32439	Woodbury, MN
Patricia Moore Boyette, #10741	Raleigh, NC
Joseph Alan Breazeale, #11976	Youngsville, NC
Graham Carpenter Brice, #22143	Wilmington, NC
Kelsey Danielle Navala, #45225	Beaumont, TX
Judy Mooring Brune, #16133	Greenville, SC
Kaitlyn Marie Byrd, #39672	Fuquay-Varina, NC
Daniel Paul Cafarella, #36983	Worthington, OH
Kerry Danielle Cannon, #37855	Gate City, VA
Kenneth John Carlson Jr., #30089	Greensboro, NC
Christopher Ryan Carroll, #46643	Durham, NC
Kathy Huffman Carswell, #25960	Morehead City, NC
Daniel Davis Carter, #39378	Carolina Beach, NC
Charles Brooks Carver, #3172	Chapel Hill, NC
David Christopher Cash, #16856	Winston Salem, NC
Peter Lawrence Cerquone, #45558	Arlington, VA
James Irwin Cobbler Jr., #14722	Winston Salem, NC
Aaron Louis Cohen, #37651	Raleigh, NC
Robin Downs Cotton, #18983	Cary, NC

Inactive Status (continued)

Hannah Marie Coulling, #46788	Salem, VA
Joseph Neal Council, #21469	Concord, NC
Andrew Carl Dagen, #42732	New Haven, CT
Johnny Davidson Jr., #12307	Myrtle Beach, SC
Brad William DeAngelo, #39832	Clarksboro, NJ
Bridget Elaine Demery, #45938	Atlanta, GA
Patrick Charles Dever, #41558	Raleigh, NC
Erica Leigh Dinner, #46042	Cary, NC
Evan Patrick Doughty, #43920	Durham, NC
Timothy John Dragelin, #46384	Charlotte, NC
Mary K. DuBose Lentz, #40927	Charlotte, NC
Margaret McPhillips Eifler, #26579	Cary, NC
William Preston Ellis, #24955	Greensboro, NC
Paul Lawrence Erickson, #23991	Asheville, NC
Robert Edmund Faulkner, #15791	Rock Hill, SC
Victor Manuel Feliciano Jr., #34062	Marietta, GA
Pamela Estes Fleming, #24719	Atlanta, GA
Carriea K. Shemone Flowers, #30989	The Colony, TX
Paige Armstrong Frost, #45656	Westfield, IN
Xiaoxi Gao, #43686	Princeton, NJ
Richard Gary Gilbert Jr., #34269	Knightdale, NC
Ellery Troy Givens, #26929	Durham, NC
Mary K. Goodwin Evans, #40862	Raleigh, NC
James Charles Gould, #45931	Charlotte, NC
Delia Frances Grant, #29975	Archdale, NC
Shaun Calvin Greene, #38929	Jacksonville, FL
Terrence Edwin Haakenson, #29754	Charlotte, NC
Angela Watkins Hall, #25814	Kure Beach, NC
Kaitlyn Marie Hastings, #43034	Charleston, SC
John Patrick Heffron, #46642	Charlotte, NC
Justin Bryce Higbee, #42555	Charlotte, NC
Jeffrey Allan Hill, #25816	Greensboro, NC
Jonathan Adoneran Hill Jr., #18416	Charlotte, NC
David Steven Hodges, #13214	Davidson, NC
Jonathan Ross Hogg, #39501	Charlotte, NC
Stephen Mack Huggins, #13434	Baton Rouge, LA
Christopher Michael Hurst, #46626	Waxhaw, NC
Mongy Mahmoud Ibrahim, #15084	Raleigh, NC
Edward Alan Imbrogno, #20097	Raleigh, NC
Michael Scott Inglut, #36748	Switzerland
Christopher Eaton Jannes, #28210	The Woodlands, TX
Christopher Lee Jeffcoat Sr., #34345	Waxhaw, NC
W. Scott Jewell, #22727	Chapel Hill, NC
Gary L. Johnson, #19671	Cary, NC
Steven Frank Johnson II, #34357	Greenville, NC
Jean Tafadzwa Kaseke, #44953	Fuquay Varina, NC
Brendan Robert Keefe, #41865	New York, NY
Aaron Daniel Kees, #42594	Roanoke, VA
Richard Scott Kellner, #39094	Iselin, NJ
Bruce Albert Keyes, #25912	Greensboro, NC
Westley Trotter King, #39220	Holly Springs, NC
Richard Robert Kraus, #46251	Union, NJ
Austin Taylor Langston, #44578	Tallahassee, FL
Jaclyn Susanne Lee, #39334	Charlotte, NC

Inactive Status (continued)

Lee Allison Lemonds, #30998
Brenda Jane Levin, #33201
Marshall Brent Lister, #17457
Bradley Andrew Losiniecki, #46005
Yao Lu, #42901
Beverly Waugh Luke, #37627
Rodney Wayne Lundgren, #15573
Michael J. Maalik-UL-Mulk, #35657
Shelia J. Maddox, #25767
David Douglas Mall II, #40449
Shu Dong Mallari, #44120
Patrick Murray Manhard, #16829
Kamal Prakash Manik, #41306
Scott Thomas Mathis, #26726
Tracee Carter McFarland, #39931
Evan Michael Paul Miller, #45542
Kenneth Edward Mills, #17535
Tanya Yvette Mitchell, #14136
Richard Edward Moss, #16772
Stefan Muecke, #38974
Gina Nam, #27306
Leilani Bradley Nantz, #19980
Edwin Thomas O'Connor, #25439
Joseph John Oliveti, #46020
Giacomo Panizzolo, #39739
Natasha Janelle Pate, #45073
Kathryn M. Patton, #42638
Phyllis McArthur Pearson, #16652
Marion Wooten Peebles IV, #36730
Thomas J. Phelan, #31848
Stephen Joseph Potter, #35052
John Wayne Potts, #10720
Mary Anne Prascak, #32982
James Robert Pratt Jr., #42622
Charles Eugene Price, #3183
Rachel E. Raiford Spinarski, #23695
Anna Pendergrass Rankin, #45331
Douglas James Reynolds, #13249
Douglas Stuart Reynolds, #12478
David Richard Rhode, #21702
Kelly Patricia Riffenburg, #35104
J. Hart Roberts Jr., #3515
David Marshall Robinson, #16060
Vladimil Roca, #40961
Misty Lynette Roddey, #25585
William Scott Rogers, #27646
Olena M. Romanchuk, #42037
Joe Carl Rowe, #3320
Joseph Franklin Ryals, #2472
Joy Michelle Strong, #40833
Donald Craig Schroder, #28728
John Avery Scotton Jr., #38860
Samantha Jo Shaffer, #46983
Gary Wade Shelnut, #32375
Charlotte, NC
Charlotte, NC
Efland, NC
Charleston, SC
Morrisville, NC
Savannah, TN
Winston-Salem, NC
New Orleans, LA
Huntersville, NC
Charlotte, NC
Charlotte, NC
Apex, NC
Matthews, NC
Sugar Mountain, NC
Morristown, TN
Winona Lake, IN
Winston-Salem, NC
West Orange, NJ
Beaufort, NC
Lithia, FL
New York, NY
Charlotte, NC
Philadelphia, PA
Weaverville, NC
Charlotte, NC
Durham, NC
Charlotte, NC
Auburn, AL
Charlotte, NC
Cary, NC
New York, NY
Statesville, NC
The Villages, FL
Myrtle Beach, SC
Goldsboro, NC
Carrboro, NC
Houston, TX
Osterville, MA
Franklin, TN
Cary, NC
Columbia, SC
Mount Pleasant, SC
Cornelius, NC
Chicago, IL
Charlotte, NC
Lenoir, NC
Franklin, NC
Hickory, NC
Annandale, VA
Raleigh, NC
Moravian Falls, NC
Barrington, RI
Federal Heights, CO
Troy, NY

FINAL CPA CERTIFICATE RENEWAL DEADLINE

July 31 is the final deadline for NC CPAs to renew their individual CPA certificate for the 2024-2025 license year. The renewal can only be completed through the Board's portal/dashboard. [Instructions](#) for creating an account are available on the [website](#).

If you prefer to request inactive status, you must [complete and submit the form](#) before August 1.

Please send your CPA certificate renewal questions to the Board's Licensing Manager, [Buck Winslow](#).



Inactive Status (continued)

Maksym Shyshnyak, #30525
Elizabeth Kent Sidell, #20128
Rhonda Fulton Skiles, #23738
Michael Wayne Sledge, #18338
Jessica Lynn Stallworth, #44804
William Mark Stover, #23311
Scott I. Taylor, #31707
Spencer Andrew Thompson, #7989
Lisa C. Tomlin, #20500
Michael Anthony Tomlinson, #36255
Emily Jane Tym, #43464
Malorie Mendoza Virovets, #45731
William Blake Wager, #38683
Warren Eugene Walden Jr., #10731
Marcia McCusker Waldron, #38223
Gerald Denver Walston, #4168
Jingjing Wang Toniolo, #40224
Xutong Wang, #43659
Daniel Eugene Warren, #16564
Shirley B. Weigel, #25661
Binbin Weng, #39920
Nathaniel Karl Wheatley, #25726
Roger Kent White II, #33513
Earl Eugene Whitmire, #15647
Harley Lee Will, #39112
Steven Hal Wilson, #45927
Wayne Howard Wilson, #20088
Byung Heum Yun, #45285
Aaron Gregory Zerkel, #42711
Ruoyi Zhang, #43733
Paul Edmund Zuerner III, #12386
Raleigh, NC
Bel Air, MD
Emerald Isle, NC
Raleigh, NC
Bridge City, TX
High Point, NC
Old Hickory, TN
Hickory, NC
Lexington, NC
Fort Mill, SC
Cudahy, WI
Tampa, FL
West Linn, OR
Hickory, NC
Raleigh, NC
Wilson, NC
Richardson, TX
Frisco, TX
Charlotte, NC
Greensboro, NC
Richboro, PA
Huntersville, NC
Raleigh, NC
Raleigh, NC
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Morgantown, WV
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Noel Allen, Esq.

2024 Dates to Remember

Dates, times, and locations are subject to change.

July 31	Final Deadline: Individual CPA License Renewal for 2024-2025
Aug.19	Board Meeting, Raleigh
Sept. 2	Office Closed
Sept. 23	Board Meeting, Hickory (Lenoir-Rhyne University)
Oct. 21	Board Meeting, Raleigh
Nov.11	Office Closed
Nov.18	Board Meeting, Raleigh
Nov. 28-29	Office Closed
Dec. 1	CPA Firm Renewal/Peer Review Compliance Reporting Begins
Dec. 16	Board Meeting, Raleigh
Dec. 24-26	Office Closed
Dec. 31	Deadline: CPA Firm Renewal/Peer Review Compliance Reporting
Dec. 31	Deadline: CPE Completion for 2025-2026 CPA License Renewal

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